
Medicaid Long Term Care in Oregon

— Multnomah County ADVSD —
February 2021

Purpose & Intention

- A very high level overview of eligibility criteria for Oregon Medicaid Long Term Care
- This presentation is not legal advice
- The information presented is current as of today, rules can and do change
- You are not being asked to screen or determine eligibility
- Referrals can be placed for any person

Myth or Fact?

Medicaid benefits are portable between states.

Medicaid vs Medicare

Medicaid: State-administered program providing medical benefits and some long term care services to individuals with low-income.

Medicare: Federally-administered medical benefits. An entitlement program paid for via taxes of an individual or their spouse.
(Part A: hospital, Part B: medical, Part C: supplement, Part D: prescription drugs)



Medicaid Long Term Care Eligibility

An individual applying for services must meet both:

Financial Criteria (OSIPM or MAGI)

and

Functional Criteria (Service Priority Level)



Financial Criteria - OSIPM with Services

Oregon Supplemental Income Program Medical (OHP Plus Package)

Income:

- Up to \$2382 when applying for services
 - Unless a qualifying trust is established

Resources:

- Generally \$2000 limit for applicant
- Five year lookback for transfers and home equity value is reviewed

Other Criteria:

- Must be aged, blind, or determined disabled
- Oregon resident & meet citizen/non-citizen status

Rules are in place to prevent spousal impoverishment.



Financial Criteria - MAGI with Services

Modified Adjusted Gross Income (OHP Plus Package)

Income:

- Generally based on tax filing group & compared to appropriate income standard

Resources:

- No limit
- Five year lookback for transfers and home equity value is reviewed

Other Criteria:

- Generally cannot be 65 or older, receiving Medicare, or receiving SSI (exceptions for Pregnant, Parent, Caregiver)
- Oregon resident & meet citizen/non-citizen status

1040X Department of the Treasury - Internal Revenue Service
Amended U.S. Individual Income Tax Return OMB No. 1545-0047
 See separate instructions.

This return is for calendar year **2018**, or fiscal year ended **12/31/2018**. See separate instructions.

Print your name and social security number. If a joint return, spouse's first name and year. Last name. Your social security number.
 Home address (do not include P.O. box if mail is not delivered to your home). Apt. No. Phone number.
 City, town or post office, state, and ZIP code. If you have a foreign address, see page 1 of the instructions.

A If the address shown above is different from that shown on your last return filed with the IRS and you would like us to change it, check here. ☐
B Filing status. Be sure to complete this line. **Note.** You cannot change from joint to separate returns after the due date.
 On original return ☐ Single ☐ Married filing jointly ☐ Married filing separately ☐ Head of household ☐ Qualifying widow(er)
 On this return ☐ Single ☐ Married filing jointly ☐ Married filing separately ☐ Head of household ☐ Qualifying widow(er)
 If the qualifying person is a child but not your dependent, see page 2 of the instructions.

Use Part 4 on the back to explain any changes.

Income and Deductions (see instructions)		A. Original amount or amount reported on prior return	B. Net change—amount of increase or decrease	C. Correct amount
1	Adjusted gross income (see page 5)	1		
2	Itemized deductions or standard deduction (see page 3)	2		
3	Subtract line 2 from line 1	3		
4	Exemptions. If changing, fill in Parts I and II on the back (see page 5)	4		
5	Taxable income. Subtract line 4 from line 3	5		
6	Tax (see page 4). Method used in col. C	6		
7	Credits (see page 4)	7		
8	Subtract line 7 from line 6. Enter the result but not less than zero	8		
9	Other taxes (see page 4)	9		
10	Total tax. Add lines 8 and 9	10		
11	Federal income tax withheld and excess social security and tier 1 RRTA tax withheld. If changing, see page 4	11		
12	Estimated tax payments, including amount applied from prior year's return	12		
13	Earned income credit (EIC)	13		
14	Additional child tax credit from Form 8812	14		
15	Credits from Form 2439, Form 4136, or Form 8880	15		
16	Amount paid with request for extension of time to file (see page 4)	16		
17	Amount of tax paid with original return plus additional tax paid after it was filed	17		
18	Total payments. Add lines 11 through 17 in column C	18		
19	Overpayment, if any, as shown on original return or as previously adjusted by the IRS	19		
20	Subtract line 19 from line 18 (see page 5)	20		
21	Amount you owe. If line 10, column C, is more than line 20, enter the difference and see page 5	21		
22	If line 10, column C, is less than line 20, enter the difference	22		
23	Amount of line 22 you want refunded to you	23		
24	Amount of line 22 you want applied to your estimated tax	24		

Sign Here
 See page 1 for more details.
 Taxpayer's signature Date
 Preparer's signature Date
 Preparer's name (print) Date
 Preparer's title (print) Date

Cal. No. 1090L Page 1040X (Rev. 11-2005)

Myth or Fact?

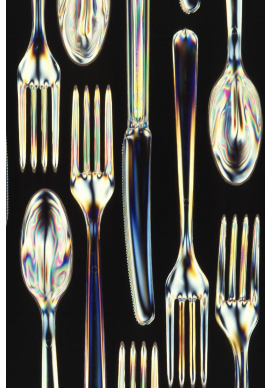
A person who crawls to get around is considered independent with Mobility per Medicaid rules.

Activities of Daily Living that Drive Eligibility

Mobility



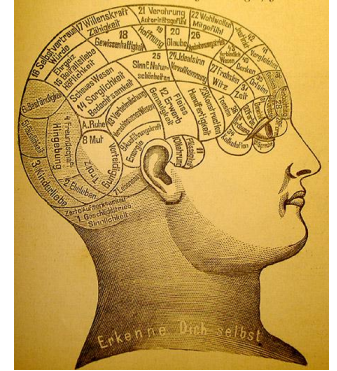
Eating



Elimination



Cognition



Assessment Timeframes



30 days before and 30 days after the assessment date.

Timeframe limits do not apply when assessing cognition.

Service Options

If an Oregonian is eligible for Medicaid LTC they are eligible for services in various settings (as appropriate based on assessed care need).

- ❖ Nursing Facility
- ❖ In Home
- ❖ Adult Foster Home
- ❖ Assisted Living Facility
- ❖ Residential Care Facility
- ❖ Specialized Contracted Facilities

Medicaid LTC Payment Limitations

At this time Medicaid is unable to provide paid supports around:

- Preventative needs
- Companionship
- Housing services

Myth or Fact?

Anyone can apply for
Oregon Medicaid Waivered
Services.

Get More Information:

Multnomah County Medicaid Services Screening

Contact options:

- 503-988-9450 (phone)
- 503-988-3339 (fax)

Statewide:

- Contact your local ADRC or APD/AAA office
- 800-699-9075 (ONE Customer Service)
- one.oregon.gov (Online)

Thank you for your time
